

ILLINOIS DEPARTMENT OF CENTRAL MANAGEMENT SERVICES
CLASS SPECIFICATION

REHABILITATION CASE COORDINATOR SERIES

<u>CLASS TITLE</u>	<u>POSITION CODE</u>	<u>EFFECTIVE</u>
REHABILITATION CASE COORDINATOR I	38141	06/01/2015
REHABILITATION CASE COORDINATOR II	38142	06/01/2015

SERIES INTRODUCTION:

This series includes positions responsible for coordinating client records for rehabilitation counselors in an agency field office or location assigned as an agency field office. Coordinators are performing a variety of clerical and support functions such as: keyboarding forms and letters, operating personal computers, filing and maintaining case materials, updating case history information, preparing vouchers, answering routine questions by clients and the public, conferring with vendors by phone or mail concerning payments issues and services provided and in maintaining a counselor's itinerary. Incidental work-related travel to attend staffings, meetings, in-service training, etc., may be required.

The Rehabilitation Case Coordinators I and II perform similar duties. The two levels of coordinators primarily differ in the level of supervision received and scope of decision making. Coordinators at the first level receive more direct supervision and/or functional guidance from higher level coordinators and counselors concerning case assignments, in the verification of procedures, approval for vendor authorization, review of client's status and in the steps to follow in making vendor contacts. Positions at the first level also receive in-service training designed to more clearly define the entire rehabilitation process as it relates to case monitoring and related rehabilitation terminology.

The Coordinator II, on the other hand, typically has "unlimited" approval authority for signing all medical authorizations and invoice vouchers when a case is in active status, for supplemental authorizations and all cancellations as determined by the counselor's assessment of client needs and the continuation of services. While both levels of coordinators will provide assistance to new employees, a Coordinator II would have the additional responsibility of reviewing work prepared by lower level coordinators and providing in-service training to lower level staff as needed.

REHABILITATION CASE COORDINATOR I

POSITION CODE: 38141

DISTINGUISHING FEATURES OF WORK:

Under direct supervision, receives case management instruction necessary for successful coordination of client case records and documents in a field counseling office; performs routine clerical tasks in maintaining client case files, records and documentation pertaining to service delivery activities; follows state, federal and agency rules, regulations, policies, detailed procedures and current operating practices in coordinating client case data; monitors client case status; maintains case files; keyboards case letters and reports; compiles and prepares related case reports as requested.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Plans daily casework activities, according to predetermined standards or the counselor's direction, determining client case priorities based on client status information provided on computer printouts; reviews client case status records, organizing data and preparing listings and appropriate notes for the counselor; completes necessary forms to move cases and performs clerical and bookkeeping tasks necessary to change status of the case.
2. Meets with counselor and/or advanced level rehabilitation case coordinator on a regular basis to plan and/or discuss general casework activities; consults with counselors or higher level case service coordinators concerning sensitive issues, e.g., payment problems, acute client related problems occurring within the realm of casework responsibility and extremely difficult service processing issues. May participate in team meetings with the counselor and the casework supervisor to discuss caseload management activities.
3. Provides routine information to applicants and clients concerning procedures, rules and regulations, functions of the agency, services available and application processes.
4. Participates in an in-service training program and attends staff meetings and other staffings to acquire knowledge concerning program services, agency philosophy and operations, policy and procedure developments, medical and rehabilitation terminology, state and federal procedures, rules and regulations and particular cases.
5. Under specific instruction of the counselor and utilizing a higher level case service coordinator as a referral source, contacts other agencies, service providers, academic institutions, workshops, hospitals and treatment or training centers, by letter or phone, to gather information regarding client's disability, medical history, social and family background, benefit status, geographic location and education, adding such information to case record documentation; contacts vendors to determine if services were initiated as scheduled, if clients are having problems, why reports are missing or incomplete, to clarify procedures for price determination and to make adjustments to service costs.
6. Collects standard data, including statistics, medical information, financial data, computer codes and vendor information; compiles reports such as case load reports, special requests for case load information and client time and attendance reports.

REHABILITATION CASE COORDINATOR I (Continued)

7. Keyboards correspondence, e.g., standard and form letters, records, reports and other material from indicated sources, such as written copy, rough draft and dictaphone; keyboards release of information letters for grade transcripts and medical and test information; prepares monthly case load status reports; prepares purchasing forms by coding to computer language and locating and inserting fees for different services; keyboards client and vendor information into the computer.
8. Maintains appointment coordination for the counselor with medical consultants, clients and vendors; maintains files of correspondence and control and for follow-up on the client appointments, employment and training; reviews dates of service on all outstanding authorizations.
9. Receives, sorts and opens incoming mail; routes and distributes counselor's mail; assembles material and prepares it for mailing.
10. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.

DESIRABLE REQUIREMENTS:

Education and Experience

Requires knowledge, skill and mental development equivalent to the completion of four years of high school.

Requires one year of clerical related experience, which must include keyboarding.

Qualifying state employees, in the employee Upward Mobility Program, may complete combinations of specific proficiency tests and training programs leading to a certificate of proficiency in lieu of the stated requirements for this class.

Knowledge, Skills and Abilities

Requires working knowledge of business English, arithmetic and modern office practices and procedures.

Requires elementary knowledge of agency rules, regulations, policies and procedures.

Requires elementary knowledge of casework methods and procedures.

Requires ability to keyboard accurately at a working rate of speed and operate various office equipment, including dictating equipment and computers used in an agency field office.

Requires ability to maintain client case files and statistical records and prepare reports as requested.

Requires ability to communicate clearly, both orally and in writing.

Requires ability to establish and maintain satisfactory working relationships with applicants, social service agencies, medical specialists and other staff.

Requires ability to gain an understanding of medical terminology and social services vocabulary as related to the coordination of client case material.

Requires ability to understand and follow written and oral instructions.

In addition to having a written and spoken knowledge of the English language, candidates may be required to speak and write a foreign language at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.

REHABILITATION CASE COORDINATOR II

POSITION CODE: 38142

DISTINGUISHING FEATURES OF WORK:

Under direction, in an agency field office, independently performs clerical case service tasks and activities essential to securing and coordinating information and data pertinent to clients of rehabilitation counselors; coordinates case service management tasks to ensure service purchase and delivery in accordance with current state, federal and agency rules, regulations, policies and procedures; monitors client case status; maintains case files; compiles and prepares case related reports; may provide in-service training to lower level service coordinators; may conduct preliminary interviews or take applications in the office, in the absence of the rehabilitation counselor, when additional travel would be an inconvenience or handicap for an applicant or client.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Provides detailed information in answer to phone, letter and/or personal inquiries, concerning the scope and variety of rehabilitation programs and services available, functions of the agency, application procedures and preliminary interview topics; explains state, federal and agency rules, regulations, policies and procedures pertaining to rehabilitation services.
2. Provides instruction to clients on service arrangements: the when, where and limitations, when to submit vouchers and how to complete them; informs clients of reasons for service delivery delays; responds to a variety of client inquiries including confidentiality of information, administrative review practices and civil and appeal rights; establishes rapport with clients and employs empathy in relating to them.
3. Monitors case status to determine individuals who need appointments with the counselor, who have completed a particular phase of their program and/or are in need of follow-up counseling; establishes and maintains various files for follow-up on the client's appointments, employment and training.
4. Gathers client information from various sources, e.g. computer printout; keyboards correspondence, case memorandum entries and individual written rehabilitation plans on clients for counselors, utilizing medical and rehabilitation terminology; compiles, prepares, keyboards, proofreads and processes necessary forms for completion of individual plans, including authorizations, cancellations and service plans.
5. Explains state and agency purchasing rules to service providers; answers questions received by phone or letter, regarding price, voucher completion and changes affecting billing; contacts vendors, medical service providers and other agencies for specific information to resolve service-related problems; provides agency offices with financial information for reconciliation of out-of-balance financial and statistical file information in order to close a case.
6. Compiles and keyboards specialized statistical reports pertaining to case load management, time and attendance of employees and inventory; verifies dates, costs and types of service and other details necessary to coordinate service activities and service delivery; types client and vendor information into the computer.
7. Plans, conducts and/or participates in a variety of in-service training programs for lower level staff; provides functional guidance to lower level staff when reviewing and taking case materials, forms, correspondence, vouchers and authorizations for accuracy and propriety.

8. Receives, sorts and opens mail determining priority and appropriate disposition of incoming mail; signs routine mail, forms, supplemental authorizations and vouchers as authorized by the counselor; originates some correspondence of a routine nature. May perform other duties as assigned by the supervisor, e.g., maintaining personnel files, issuing payments for office rental and utility bills, etc.
9. May conduct preliminary interviews and/or take applications in the office in the absence of a rehabilitation counselor, when travel would be an inconvenience or handicap for an applicant or client. Participates in team meetings with the counselor and casework supervisor to discuss caseload management activities.
10. Performs other duties as required or assigned which are reasonably within the scope of the duties enumerated above.

DESIRABLE REQUIREMENTS:

Education and Experience

Requires knowledge, skill and mental development equivalent to the completion of four years of high school.

Requires two years of clerical experience as would be gained as a Rehabilitation Case Coordinator I.

Knowledge, Skills and Abilities

Requires extensive knowledge of office principles, practices and procedures.

Requires extensive knowledge of business English, spelling and commercial arithmetic.

Requires extensive knowledge of casework methods and techniques.

Requires extensive knowledge of agency rules, regulations and policies as they relate to case service monitoring.

Requires ability to explain and/or apply state, federal and agency rules, regulations, policies and procedures regarding service delivery in case management activities.

Requires ability to coordinate case management functions in a rehabilitation field office.

Requires ability to maintain client case files and statistical records and prepare case management reports.

Requires ability to establish and maintain satisfactory working relationships with applicants, social service agents, medical specialists and other staff.

Requires ability to keyboard at a working rate of speed and operate various office equipment, including dictating equipment and personal computer used in an agency field office.

Requires ability to communicate clearly both orally and in writing.

Requires ability to understand medical terminology and social services vocabulary as related to the coordination of client case material.

Requires ability to understand and follow written and oral instructions.

May require ability to provide orientation, functional guidance and training to lower level coordinators.

In addition to having a written and spoken knowledge of the English language, candidates may be required to speak and write a foreign language at a colloquial skill level in carrying out position duties in conjunction with non-English speaking individuals.